

POLICIES & PROCEDURES



MANUAL



2023 Edition

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POST 66

2023 POLICY &

PROCEDURE MANUAL

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post66slo.org

1st. Edition

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Please see 36 U.S.C. Section 21704: The Corporation (The American Legion) may provide guidance and leadership to organizations (departments) and local chapters (posts) ... but may not control or otherwise influence the specific activities and conduct of such organizations (departments) and local chapters (posts).

Taken from the [2022 Officer's Guide and Manual of Ceremonies](#)

FORWARD

The Policy & Procedure Manual is the principal handbook issued by Post 66 to help our American Legion Family understand our operations and how to fulfill their roles. Policies are the rules we agree to follow. Our Post 66 by-laws is a collection of many of our most important policies. Procedures define the process of HOW we organize and conduct the business of Post 66. This includes the step-by-step processes we are expected to follow.

The manual includes our by-laws, leader job descriptions, committee expectations, procedures for conducting key post events and a document appendix.

The Policy & Procedure Manual will help bring into focus the planning and organization of Post 66 for all the members of our American Legion Family. The manual is both a written guide for all Post 66 American Legion Family members to follow and a training document.

The manual is reviewed annually to ensure our policies and procedures are up to date. Policies and procedures are modified and updated in response to new situations and challenges as they occur.

Output of our most important operations would become more consistent, as everyone would better understand what is expected. Continuity would be enhanced as critical operational information (passwords, etc.) will no longer be held by one person. Well defined and recorded, operational procedures would no longer be suggestions based on personal preferences. Instead, they would be procedures vetted by the Post 66 Executive Committee and where necessary approved by our Post 66 membership.

POLICIES

[2022 Post 66 Bylaws \(12-2022\)](#)

Uncertain what other policies we need to include on this page.

What is a Policy? The Rules.

Policies in an organization represent the global rules and definitions. They are not designed to tell you the steps on “how” to do something, but the rules that need to be followed. Think of driving a car. When you drive from your home to work, you need drive on roads, obey speed limits and follow traffic signals. It doesn’t matter what route you take or what mode of motorized transportation, these rules or Policies still apply. The Policies of the road don’t tell you what time to leave, what vehicle to use or even what route to take. The Policies simply govern all of the rules you need to follow along the way.

What is a Procedure? The Steps.

to visual workflows to formal documents.

LEADERS

Our leaders serve our hopes for success. When we elect our leaders, we do so in the hope they can make the right decisions that bring us closer to our ideals of success; service to our veterans, their families, and the SLO community. When we elect our leaders in Post 66, we bestow upon them the authority to make the decisions they feel will help us succeed. Once we bestow the authority to lead upon our leaders, we are morally obligated to follow their lead.

Look for the Best Leaders

What should we look for in the Legionnaires we elect to lead our posts? The most obvious is a desire to serve. Legionnaires who really want to serve as leaders, usually make better leaders than those who do not.

Here are some thoughts on the kind of things we should all look for, in Legionnaires we select as leaders:

- A willingness to learn more about our history and programs.
- The time and energy needed to succeed.
- The ability to develop a clear vision for post success.
- Effective computer skills, which are increasingly becoming important.
- Ability to get the job done and keep the Legion Family together.

The Legionnaires we elect to lead our posts are important. Seek out and elect the best Legionnaires available to lead, then work hard to support them, as we work hard to serve all our veterans.

POST COMMANDER (ELECTED)

"FIRST AMONG EQUALS"

"First Among Equals" is a good way to look at the relationship of the post commander to other members of our American Legion Family. As an elected leader, the commander ensures our post's success and keeps our post family together in the process.

Our post commander is the president of the Post 66 Board of Directors and is the presiding officer at all post meetings. The post commander is also the voice of the post, within the post and at all meetings beyond the post. Post commanders work with and through other leaders of our Legion Family to ensure our post's success, as they cultivate and guide members for future leadership roles.

Sources of help

The Post Commander relies on a team of post officers, other post leaders, past post-commanders, and taps the potential of the Post American Legion Family. Valuable assistance comes, where necessary, from district officers, department officers, and National Headquarters staff.

By-Laws

Section 1. Duties of the Commander. *It shall be the duty of the Post Commander to preside at all meetings of the Post, and to have general supervision over the business affairs of the Post, and such office shall be Chief Executive Officer of the Post. They shall perform such other duties as directed by the Post.*

Resources

- [National Publications](#)
- [2022 Officer's Guide](#)
- [District Commander's Guide](#)
- [Positions and Programs](#)

FIRST VICE-COMMANDER (ELECTED)

First Vice Commander: The American Legion Post Officer's Guide states this about the first vice commander, "In the majority of posts, a first and second vice commander are elected, with membership the primary concern of the first vice commander." In too many posts, the first vice commander serves as a membership committee of one. A post, even a small post, should have a Membership Committee to help with recruitment, headquarters post transfers, renewals, retention and with ensuring the post routinely has personal (by phone or in person) contact, with every member of the post. A Membership Committee of two (or more), is far more effective than the committee of one.

By-Laws, Section 2. Duties of the First Vice-Commander. The First Vice-Commander shall assume and discharge the duties of the office of Commander in the absence of, disability of, or when called upon by the Post Commander, and shall perform such other duties as directed by the Post.

First Vice-Commander (Elected)

He/she shall be in charge of membership retention and growth, annual fundraising activities, and shall review officer compensation annually submitting his findings to the executive committee by the May meeting.

SECOND VICE-COMMANDER (ELECTED)

Second Vice Commander: The duties of a post second vice commander can vary from post to post.

Most posts ask their second vice commander to follow the guidance given in the Post Officer's Guide, "The second vice commander is responsible for building an "I like my post because ..." atmosphere in which Legionnaires have fun while doing the work of the Legion."

By-Laws, Duties of the Second Vice-Commander. The Second Vice-Commander shall assume and discharge the duties of the office of First Vice-Commander in the absence of, disability of, or when called upon by the Post Commander, and shall perform such other duties as directed by the Post.

Second Vice-Commander (Elected)

He/she is the designated liaison to other veteran organizations, coordinates new member initiations and shall be in charge of Post morale to include entertainment and special programs, and other duties as directed by the Post.

ADJUTANT (ELECTED)

A topic Ramona Hedges will be developing this content

Post Adjutant: Whether the post adjutant is seen as a post ‘first sergeant’ or a continuity officer, the adjutant is a critical leader in the long term success of a post. Adjutants are responsible for keeping official records of post business, minutes of meetings and a number of key administrative duties.

Adjutant (Elected)

By-Laws, Duties of the Adjutant. The Adjutant shall have charge of and keep full and correct record of all proceedings of all meetings, and under the direction of the Post Commander handle all correspondence of the Post.

Adjutant (Elected)

He/She has charge of and keep full and correct record of all proceedings and meetings, keep membership data updated, oversee and delegate with Post Commander all Post reports and filings to District 16, Area 8, Department of California, and National office of The American Legion, Department of California

Resources:

[Adjutant Resources](#) webpage.

Communications Toolkit – [doc](#) | [pdf](#)

FINANCE OFFICER (ELECTED)

Much of the post finance officer's work is defined and determined by standard accounting practices and the needs of the post. The post finance officer is the person of integrity that helps develop a post budget and administers the post book of accounts. Finance officers also advise post leaders on the formulating and administering of financial policies, including the annual post budget.

Finance Officer (Elected)

By-Laws, Section 5. Duties of the Finance Officer. The Finance Officer shall be charged with the custody of the funds of the Post. He shall keep its accounts and report thereon at regular meeting of the Post. They shall receive all funds of the Post and pay all bills approved by the Post. The office of Finance Officer and any other officers and/or positions charged by the Post Constitution and/or Bylaws, with the responsibility of handling Post funds should be bonded.

HISTORIAN (APPOINTED)

By-Laws, Section 6. Duties of the Historian. The Historian shall be charged with the individual records and incidents of the Post and Post members, and shall perform such other duties as directed by the Post or the Executive Committee.

JUDGE ADVOCATE (APPOINTED)

By-Laws, Section 7. Duties of the Post Judge Advocate. The Post Judge Advocate's duties shall be to advise the Post officers on the construction and interpretation of the Post's By-Laws and to perform such other as are usually incident to the office.

POST CHAPLAIN (APPOINTED)

By-Laws, Section 8. Duties of the Post Chaplain. The Post Chaplain shall be charged with the spiritual welfare of the Post comrades and will offer divine but non-sectarian service in the event of dedications, funerals, public functions, etc., and to adhere to such ceremonial rituals as are recommended by the National or Departmental Headquarters from time-to-time.

POST SERVICE OFFICER (APPOINTED)

By-laws, Section 10. The duties of the Service Officer. The Service Officer shall be generally prosecuting claims and protecting the rights and privileges of all veterans, their dependents, and survivors and to handle such other matters as may be properly be considered service work.

SERGEANT-AT-ARMS (APPOINTED)

By-Laws, Section 9. Duties of the Sergeant-at-Arms. The Sergeant-at-Arms shall preserve order at all meetings and shall perform such other duties as may be from time-to-time assigned to them by the Post.

EXECUTIVE COMMITTEEMEN AT LARGE (ELECTED)

The Executive Committee, is a body of deliberation, that helps determine HOW Post 66 proceeds in our journey to succeed.

In a more detailed explanation of their job, they:

- Administer, Govern, and Manage Post 66
- Consider all Matters Affecting Post 66, and
- Serve as an advocate for the general membership of Post 66

The Post 66 membership then determines post policies with their vote, after hearing the recommendations of the Executive Committee. The final decision are made by the vote of our members.

Executive Committeemen at Large (3 Elected)

Our Post 66 By-Laws, Article IX, Section 23. The Executive Committee shall consider all matters affecting the Post and shall make recommendations to the Post, which thereafter shall be approved by the Post by a simple majority vote before becoming effective. The Executive Committee shall manage the business of the Post. They shall advocate for the general membership at meetings, assist Post Officers in directing Post business, act as Post representatives in the absence of Post commanders.

POST COMMITTEES:

The Post 66 By-Laws define the Finance Committee and Membership Committee.

Additional standing committees are appointed as the Post Commander deems appropriate. The committee chairs are appointed by the Post Commander and committee members are selected by the chair.

Many posts also have committees to support The American Legion Four Pillars of Service which are Americanism, Children & Youth, National Security, and Veteran Affairs and Rehabilitation.

POST COMMITTEES: FINANCE

Required in By-Laws.

Chair:

- [Event Based Budget](#)
- [Post Event Financial Report](#)
- [Post Financial Control Checklist](#)

Are event-based budgets used to determine financial impact of key post activities?

Post 66 By-Laws

Section 4. Finance Committee. The Finance Committee shall be charged with the administration of the financial policy, preparation of an annual budget with recommendations, and supervisions of receiving, disbursing, and ac-counting of all Post funds.

POST COMMITTEES: MEMBERSHIP

Required in By-Laws.

Chair:

Required in By-Laws.

POST COMMITTEES: BAR SERVICE

Chair: Jim Miller

The American Legion publication “Post Operations Manual” contains a lot of good suggestion on proper bar management. Here is an example:

“BEVERAGE COST CONTROL

The cost of Goods Sold in the bar should range from 30% to 40% of the Sales. This can be controlled by proper pricing, avoidance of over pouring and spillage, proper purchasing and good inventory control.

All purchasing should be under the direct control of the manager. Payment of purchases should only be paid as authorized by him. The exception would be when it is required that certain items be paid upon delivery.

Whenever it is physically possible to do so, the inventory stock room should be controlled by someone other than the bartender. This room should be kept securely locked at all times and only one person should have access to it for the purpose of storing and issuing the merchandise. Requisition in duplicate should be required for all merchandise issued.”

Resource

[Post Operations Manual](#)

POST COMMITTEES: CHILDREN & YOUTH

Chair

AN AMERICAN LEGION PILLAR OF SERVICE TOPIC.

POST COMMITTEES: FACILITIES

Chair: Mario Perez

Responsibility for maintenance of equipment, sanitation, buildings and the Post facility

Booking Manager

Uncertain where the Booking manager should be placed withing our post organization. As a function of the Facilities Committee is one idea.

POST COMMITTEES: FOOD SERVICE

Chair: Betty Bristol

The American Legion publication “Post Operations Manual” contains a lot of good suggestion on food service management. Here is an example:

FOOD COST CONTROL

Food cost should range from 35% - 45% of sales. If the food cost is higher, immediate steps should be taken to correct it.

No control system has yet been devised which, by means of the paperwork alone, will bring about the desired results. Food control is not only a clerical function, but is also calls for close attention on the part of the management and the crew to proper purchasing, receiving, storing, preparation, production costs, and merchandising. The preparation of daily cost figures through a food control system serves as a guide to those in charge and enables them to take corrective steps when the costs fluctuate too sharply and are out of line.

Resource

[Post Operations Manual](#)

POST COMMITTEES: INVESTMENTS

Chair: Dave Glidden

POST COMMITTEES: MEDIA & COMMUNICATIONS

Chair: Rick Pushies

The Media & Communications Committee is primarily responsible for communications with our American Legion Family, the San Luis Obispo community, and our local media outlets. The committee can also offer guidance on marketing and branding issues for Post 66.

Communications include:

- Website Maintenance – as needed
- Posting of program information, news stories and resources
- Archiving of important documents online
- Facebook page – as needed
- Monthly Newsletter – produced as a webpage. Notification of newsletter availability is sent to all members of our American Legion Family that we have an email address for.
- Email Communication (Mailchimp)
- Weekly Reminders of Monday Night Socials, and
- Additional emails to keep our American Legion Family informed.

Policy Statements

Response to requests for posting links on our website: *"Thank you for your e-mail. We do not post information from unsolicited or unknown sources on our web site."*

No publication of youth contact information

Post 66 Website (post66slo.org)

Webmaster is Rick Pushies (805-925-9144)

Our Post 66 website is hosted Blue Host.

The url to log in to our domain is: <https://my.bluehost.com/cgi/app?logout=1>

Our username is: post66slo.org The password is: TBD

The annual fee for domain name post66slo.org is: \$18.95, due June 4, 2023

The annual web hosting fee is \$179.88, due July 30, 2023

Our website is a WordPress site, the current version is 6.1.1

We use free version of the WordPress theme Divi, version 4.19.2 by [Elegant Themes](#) to build our website. This is the same theme used by the Department of California.

POST COMMITTEES: MEDIA & COMMUNICATIONS

Post 66 Facebook Page

Facebook page location:

<https://www.facebook.com/profile.php?id=100083362963770>

Our Facebook account username: mail@post66slo.org

Our password is: TBD

We have a new Post 66 Facebook page. The complex nature of creating and maintaining a Facebook page for Post 66 led us to create this new page, postsixtysix slo.

We now own our Facebook page and have full control over all aspects of the page. This will allow us to integrate with emails we send out using Mailchimp. It will also give us continuity in how we manage this important communication resource. Facebook is an extremely popular social media platform and many of our American Legion Family use it routinely making it an important platform for us to use.

MailChimp Account

Mailchimp account log in url: <https://login.mailchimp.com/>

Our Mailchimp username is: webteam@post66slo.org

Our password is: TBD

Mailchimp is primary tool for communicating with our American Legion Family. We use Mailchimp to email our members of:

Notification of our monthly Post 66 Newsletter availability

Reminders about Monday Night Socials, and

Additional information about post events and other operations

More to come . . .

Text messaging –

A method used more frequently by younger veterans

Good for short reminder messaging

Cost is a concern

POST COMMITTEES: NATIONAL SECURITY

Chair

An American Legion Pillar of Service topic.

Our blood drives traditionally are linked to the National Security Committee.

POST COMMITTEES: VETERANS AFFAIRS & REHABILITATION (VA&R)

Chair

POST COMMITTEES: WAYS & MEANS

Chair

2023 KEY POST EVENTS

POLICIES FOR CONDUCTING KEY POST EVENTS

[2023 Annual Activity Calendar](#)

[Post Event Financial Report](#)

Are event-based budgets used to determine financial impact of key post activities?

Event Leader, aka - person in charge of event success. The policies for conducting events are “How To” guides to help the event leader conduct a successful event.

Marketing & Advertising – Start conversation 6 months or more in advance to work with the Media & Communications Committee to develop fliers, schedule for marketing to Post 66 Legion Family internal market (Website, newsletter, Facebook, etc.) and external markets (CalPoly Veterans, Chamber of Commerce, KSBY, SLO County VSO, New Times, Camp San Luis, etc.)

Planning & Organization

Photographers, Facility Reservations, County/City Permits, VA Resource Van, Blood Mobile, Portable Toilets, etc.

2023 KEY POST EVENTS

02-12 SUPER BOWL PARTY

Event Leader:

[Post Event Financial Report](#)

2023 KEY POST EVENTS

WEDNESDAY, 02-08 VALENTINE’S DAY PARTY

Event Leader:

[Post Event Financial Report](#)

2023 KEY POST EVENTS

SUNDAY, 02-12 SUPER BOWL PARTY

Event Leader:

[Post Event Financial Report](#)

2023 KEY POST EVENTS

04-05 Post Officer Nominations

05-03 Post Officer Nominations

05-03 Post Officer Elections

2023 KEY POST EVENTS

05-19&20 CAR SHOW

Event Leader:

[Post Event Financial Report](#)

2023 KEY POST EVENTS

05-21 PANCAKE BREAKFAST

Event Leader: Nora O'Donnell, First Vice-Commander

[Post Event Financial Report](#)

2023 KEY POST EVENTS

05-29 MEMORIAL DAY

Event Leader:

[Post Event Financial Report](#)

2023 KEY POST EVENTS

06-07 LEGION FAMILY OFFICER INSTALLATION

Event Leader:

[Post Event Financial Report](#)

2023 KEY POST EVENTS

09-11 PATRIOT DAY CELEBRATION

Event Leader:

[Post Event Financial Report](#)

2023 KEY POST EVENTS

09-11 PATRIOT DAY CELEBRATION

Event Leader:

[Post Event Financial Report](#)

2023 KEY POST EVENTS

10-19 PROJECT HERO CYCLIST LUNCH

Event Leader:

[Post Event Financial Report](#)

2023 KEY POST EVENTS

10-25 BOYS & GIRLS STATE DINNER

Event Leader:

[Post Event Financial Report](#)

2023 KEY POST EVENTS

10-31 HALLOWEEN COSTUME PARTY

Event Leader:

[Post Event Financial Report](#)

2023 KEY POST EVENTS

11-08 AUXILIARY RAFFLE & SILENT AUCTION

Event Leader:

[Post Event Financial Report](#)

2023 KEY POST EVENTS

11-08 AUXILIARY RAFFLE & SILENT AUCTION

Event Leader:

[Post Event Financial Report](#)

2023 KEY POST EVENTS

12-13 LEGION FAMILY CHRISTMAS PARTY

Event Leader:

[Post Event Financial Report](#)

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Appendix:

[Post 66 Bylaws](#) (12-2022)

[Post 66 Member Handbook](#) (06-2022)

[Post 66 Brochure](#) (10-2022)

[Post 66 Service Hours Sheet](#)

[Post Event Financial Report](#) (DRAFT)

Resource Links

[Adjutant Resources](#)

[Chaplain's Center & Share a Prayer](#)

Communications Toolkit – [doc](#) | [pdf](#)

[Consolidated Post Report \(CPR\)](#)

[Employment Resources](#)

[Financial Resources](#)

[Frequently Asked Questions](#) (FAQ)

Department [Legion Auxiliary Website](#)

[Legion Riders Website](#)

[Membership Committee](#)

[National Legion Publications](#)

[Post Fidelity Bond Resources](#) (*NEW Information*)

[Post Operation Manual](#)

[Post Service Officer \(PSO\)](#)

[Program Forms and Award Applications](#)

[Youth Protection Guidelines PDF](#)

[Sons of the American Legion Website](#)

[Temporary Financial Assistance](#)

[Temporary Financial Assistance Application](#)

[Training](#)

[Training Request Form](#)